



Effective Practices in Vocational Evaluation Report Writing

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Abstract

An effective vocational evaluation includes a well-written and comprehensive final report. Evaluation reports are commonly considered a requirement of accredited and regulated agencies; however, report writing is a complex skill that requires ongoing professional development and practice. A well curated vocational evaluation report can serve as an effective way to assist the client and their personal and professional support systems to proceed through the necessary steps for career success. The purpose of this article is to review effective practices regarding report writing in vocational evaluation. The intent of a vocational evaluation report will be reviewed in relation to some of the foundational concepts of the profession of vocational evaluation. Additionally, this article will address challenges to effective report writing and highlight strategies to assist with the report writing process. Finally, common errors of vocational evaluation report writing will be discussed.

Keywords: vocational evaluation, career assessment, report writing, effective practices

Introduction

Vocational Evaluation is defined as “a comprehensive process that systematically uses work, either real or simulated, as the focal point for assessment and vocational exploration, the purpose of which is to assist individuals in vocational development. Vocational evaluation incorporates medical, psychological, social, vocational, educational, cultural, and economic data into the process to attain the goals of evaluation.” (Dowd, 1993). Vocational evaluators and career assessment professionals use their skill set to aid clients in self-discovery for the development of an employment plan (Thomas, 2020). The result of a vocational evaluation provides useful and realistic information to clients that can be used to help the client to meet their career and related

goals. In the end, the vocational evaluation report serves as a clear and meaningful document outlining the process of the evaluation and provides a roadmap for the client to successfully reach their career goals. As indicated in the document, *A New Paradigm for Vocational Evaluation Empowering the VR Consumer through Vocational Information* (Thirtieth Institute on Rehabilitation Issues, 2003), the vocational evaluation report is the primary form of communicating the results of the evaluation or assessment and serves as an official document of the vocational evaluation activities in which the client participated as well as the resulting outcomes of the process.

The final report not only represents the work that the professional has facilitated, but it will also be used to guide and direct decisions that will impact the life of the client. The final report is a critical component of vocational evaluation. Given the impact of the report, the vocational evaluation and career assessment process can be useful to professionals at all experience levels. Ongoing professional development and education regarding the development of vocational evaluation reports can additionally be helpful to professionals in the vocational evaluation and career assessment professions. Gaining and maintaining effective report writing skills is a *key role* in vocational evaluation and career assessment practice.

In addition to accurately portraying technical information in the report, professionals must embody a mindset of purpose, intentionality, empathy, compassion, and integrity when creating vocational evaluation and career assessment reports. The report writing process demands quite a bit from the professional. The reality is that, at times, report writing can feel like a very daunting process. The demands of effective report writing seem to be commonly felt amongst human service professionals, including vocational evaluators. Huff (2020) concurred that the process of report writing is an intimidating task, as it requires communicating the complexities of what has been learned into a single document. In vocational evaluation, the effective communication of evaluation results require excellent written communication skills as well as the ability to interpret, synthesize, and integrate data from the vocational evaluation that is customized for the individual client (Thomas, 2020).

The complexity of report writing further warrants professional development and education for vocational evaluation and career assessment professionals regarding the topic of report writing. Therefore, the purpose of this paper is to provide information on report writing for vocational evaluators and career assessment professionals. This review will address several topics relevant to report writing including ethics and values, the importance of abiding by guiding vocational evaluation principles, triangulation and synthesis of information, person-centered writing skills, review of common myths, strategies to avoid common mistakes, and methods for addressing referral questions and recommendations. Additionally, this paper will provide a practical tool for the evaluator to use for preparing and reviewing reports.

Pre-Writing

To create an effective final report, the professional must have a strong foundation for report writing, such as understanding key principles, values, ethics as well as the

essential roles and responsibilities of the vocational evaluation and career assessment professional.

Principles, Values, and Ethics

When evaluators have a strong understanding of the principles, values, and ethics that are most critical to their profession, they will feel intentional and clear when writing their reports. Once the report is finished, an evaluator needs to be confident that the report is complete, that all referral questions have been answered, and that the content of the report will be useful to clients. Confidence begins to grow, knowing that the assessment process has been conducted in a way that aligns with the evaluator's key principles, values, and ethics as they begin the report. As indicated in the 30th IRI (2003), the evaluation process and report guided by the key principles will be affirming and valuable to the client and their stakeholders. Continuously following key principles will ensure that a client feels validated, understood and engaged in not only the assessment process, but in the findings and recommendations in the report.

Principles guide evaluators to educate and inform clients of the purposes of the report. Clients will be informed that their participation will allow the evaluator to capture evidence necessary to provide recommendations that will move the client forward with their goals. The report will be seen in a positive light as clients know it is about them, for them and includes ideas and options about which they are excited. Additionally, following principles will ensure that the stakeholders know the importance of the report and how it will be incorporated into the overall picture of the client's planning and outcomes. The clarity of the report will ensure that there will be no confusion regarding the actions and steps that have been taken by all parties involved.

Evaluators can be prepared for writing an applicable and thorough report by following principles for effective practices. Author suggested principles begin to include the evaluation with the report in mind, view the report as part of a developing process, remember the role and function of the information presented for the profession, include behavioral observations, practice responsible use of assessment, instruments, and techniques, and make recommendations grounded in evidence and consistency.

Begin With the Report in Mind

Vocational Evaluators are encouraged to consider report writing at the very beginning of the assessment process. The evaluator must come to the evaluation prepared, ensure the client that they are aware of the referral questions, know the basic background information as it pertains to the client, select appropriate assessment instruments, and by guaranteeing that they have all necessary documentation from the referring party.

View the Report as Part of a Developing Process

Evaluators need to approach the process with an understanding that this is only one aspect of a client's career development. Evaluators must understand that the client's

career development, including the evaluation, is an ongoing and continual process. This will inevitably help the evaluator limit the amount of pressure that they place on themselves to capture everything in one report. It is important that both the evaluator and the report reader understand that the information presented is essentially only a glimpse into the client's life, while also remembering to be more focused on the process so it may help guide their next steps.

If evaluators do not keep the big picture in mind, they may author a report that is limiting for the client. They may use language that hinders potential options and may narrow prospects and future goals. For example, evaluators should not use language that has the potential to constrict the vocational plan or language that limits future change and growth as an outcome of participation, training or education. Additionally, evaluators should write from a career development standpoint so that recommendations can be seen in terms of the client's current situation with clear next steps in the process, but should also leave room for future change, especially as the client develops their interests, skills and abilities. Evaluators using only one piece of information, such as an academic test score, a functional limitation, or a singular stated vocational interest, will present a report that will have limited utility for the client which will also limit their potential to build upon future goals.

Reports should not be viewed as one of the final tasks of the vocational evaluation process to simply be read and filed away. Rather, the report needs to have direct applicability on the career and educational future of the client and be used and built upon after the evaluation has been conducted (30th IRI, 2003).

Remember Role and Function

Evaluators need to remember their role and function within a larger service delivery system. Understanding their role will remind them to request input from a variety of individuals who are involved in the client's rehabilitation process, especially when seeking answers to questions beyond their expertise. When evaluators spend time getting to know the client and connecting with stakeholders on the client's vocational team, the evaluator will have a wide scope of information and may better understand their client so that they may be able to draw on this information for report writing. An important note is that the author of the report must always be the individual that performs the vocational evaluation interview and subsequent testing. For the purposes of this article, that individual is referred to as the evaluator.

Include Behavioral Observations

If evaluators have collected detailed behavioral observations (what the client was doing, what was happening around the client, date, time of day, etc.), including and paying attention to self-reports and statements from the client, they can be confident that they will have enough key information to place into their report to support their recommendations. These observations may be solely based on their self-reported abilities or in comparison to objective information in records. Vocational evaluation and assessment must be grounded in career, vocational, and work contexts (Castiglione, et al,

2018). Everything that the evaluator does ought to be relevant for determining vocational information. Evaluation will be most effective when hands-on work, whether real or simulated, is thoroughly included. Community-based assessments are an ideal practice and should also be considered (Castiglione, et al, 2018).

Practice Responsible Use of Assessment Instruments and Techniques

There should be great importance placed on the idea that the assessment utilized is current, cross-validated, and relevant in order to be useful. Having a wide variety of assessment tools and techniques is essential so that the evaluator may be prepared for the specific needs of the client, in order to obtain the information needed to effectively answer referral questions. Considering universal design for learning principles, evaluators must be ready to provide assessment/tasks that meet a variety of learning style preferences. Having a diverse toolkit of activities to use to assess the client will ensure that the process is engaging and meaningful for the client. It is imperative that documentation for the various tools used are reflected in the report.

Regarding the administration of the vocational assessment, research from Dillahunt-Aspillaga, et. al., (2015) indicates that an evaluation of a client with a traumatic brain injury must include assessment tools that are more commonly administered for this clientele and must include their vocational interest inventories, achievement tests, behavioral observations, work values, aptitude or intelligence tests, work samples, and general ability aptitude assessment. While this research was specific to evaluations for clients post traumatic brain injury, the types of assessment tools indicated are appropriate and can be administered during the process of vocational evaluation for a client with a disability. The Dillahunt-Aspillaga et al., (2015) study draws attention to a wide range of tools that may be necessary to address the needs of individual client. To make more informed choices regarding assessment tools, evaluators must first understand the purposes of the results of the assessment process and how they are to be used and, most importantly, that the results are to move a client toward their goals as well as answer referral questions.

Make Recommendations Grounded in Evidence and Consistency

Evaluators must ensure that the recommendations put forward are consistent with the abilities and goals of the client as well as address referral questions. Considering the potential jobs for the client, those that are reviewed should be jobs that are in demand or can feasibly be achieved. All conclusions that are made should be supported by other documentation, and recommendations should be both practical and actionable. If vocational evaluators focus on establishing recommendations based on current information such as completing research on current labor market trends, they will be able to create a report that has strong reliability.

Values

Professional values are especially important as we approach this extremely critical part of our jobs as vocational evaluators. The foundation of vocational evaluation and

assessment is that all human assessment is holistic, humanistic, and equitable. A holistic approach encompasses issues of diversity, including all relevant attributes of the client, their existing or potential environments (ecologies), and must include the various interactions between the client and their environment(s). A humanistic approach to vocational evaluation and assessment requires a client's involvement, informed choice, self-determination, and a process that is designed and implemented to benefit the client served with an emphasis on their individual capabilities and strengths.

Equitable services ensure that each client is treated fairly. Clients need, as much as possible, access to an assessment process that is as unbiased and nondiscriminatory. Furthermore, the environment must suit the client with minimal accommodations rather than the client being required to adjust to fit the vocational environment. (Castiglione, et al, 2018). All specific processes and/or accommodations provided will be noted clearly in the report.

Value the Right to Work

Every individual has the right and opportunity to engage in a meaningful and satisfying career and/or employment, which will contribute to his or her quality of life in a positive way (Preamble for VECAP's By-laws, 2020). Keeping this value in mind, evaluators can ask themselves this question as they write, "How will this document best help the client become employed in a satisfying career that will contribute to their positive quality of life?" When all aspects of the report have this value and focus on the forefront, the report will be certain to be meaningful to the client. The report should also empower clients as they will feel heard, understood, and supported. The information and recommendations within the report will be accessible, understandable, and easy to utilize thus helping the client gain more of a sense of control over their life.

Value the Client as a Partner in the Process

Vocational evaluators can include their client as a partner in the process by communicating ideas and recommendations with them throughout the process as well as informing them they have the right to know what is included in the report. Seeing this process from the viewpoint of an active partner or even director will contribute to the client taking ownership of the process and planning that follows. Having the client's insights and suggestions, including the review of recommendations at the end of the process is also advised. Clients should not be surprised by anything included in the report following completion of the process because communication regarding what will be in the report has been completely clear between the evaluator and the client.

Value Self-Determination and Empowerment

To promote client empowerment, information in the report should include services and recommendations that clients can negotiate independently or with minimal accommodations and support. As clients realize that they will be moving on independently, it is important that they feel capable of accomplishing the next steps. Keeping professional values in mind will allow evaluators to include report information

that serves as a springboard by listing the specific steps necessary for the client to have the opportunity to achieve their life goals. Reports should include information that will lead the client towards a positive vocational outcome and not a procedural or attitudinal roadblock. (30th IRI, 2003)

Value Cultural Diversity

Vocational evaluators recognize diversity and embrace a cross-cultural approach in support of the worth, dignity, potential and uniqueness of clients and their environments. Reports must promote nondiscrimination and should not be based solely on race, color, class, gender, gender identity or expression, sexual orientation, ethnicity, national origin, immigration status, age, religion, disability, genetics, or veteran status. This should also include groups or clients disenfranchised by social and economic challenges (VECAP Code of Ethics, 2021). Vocational evaluators must also keep personal bias in check, be aware of potential misperceptions, and even stereotypes. Reports are to be written in a way that honors the client's multicultural identity and ensures biases are not communicated within the report.

Ethics In Report Writing

Guiding professional ethics are critical for Vocational Evaluators. Evaluators have a professional code of ethics that must be followed and this includes their accrediting bodies, which includes the Canadian Vocational Rehabilitation Professionals (CVRP) Code of Ethics (2020) and the Commission on the Certification of Rehabilitation Counselors (CRCC) Code of Ethics (2009), but must also include any organizations of which they are members, such as Vocational Evaluators and Career Assessment Professionals (VECAP). Considering all of the professional codes of ethics applicable to the evaluator, consistency and respect in regards to the client's rights to privacy, confidentiality, and autonomous decision-making (self-determination) must be a priority. Informed consent is a crucial ethical standard as clients must be informed of the purpose of the process and how that information in the report will be used by those who are given access to it. Clients must also understand that it is up to them to give permission for reports to be shared with others and that the results of the assessment should be used for the intended purpose. All efforts need to be made to ensure that the report results are not misused or used inappropriately. Reports will be used for the basis for recommendations.

Vocational evaluators strive to engage in actions that are beneficial and contribute to the welfare of others, to help others and to promote good. Vocational evaluators are required to do no harm, which includes avoiding situations that could negatively impact a person's freedoms or well-being. They promote fairness and justice in the access to and benefit from assessment services. In reference to access, in order to promote a fair and just process, evaluators need to take into consideration potential barriers that clients may have accessing assessment services. For example, if a female client's culture/background informs them that they should not be alone with a male, a male evaluator will want to ensure there is another individual present so the client will feel comfortable. Or, if a transgender individual has been mistreated in certain career or industry sectors, the

evaluator will need to be aware and sensitive to their situation when exploring career options. If the client's socioeconomic status appears to be limiting their perspective options, an evaluator will need to be ready to broaden their expectations to promote fairness and equity. Overall, potential barriers for a positive and meaningful assessment process need to be addressed and removed, as necessary.

Vocational evaluators should exercise reasonable judgment and take precautions to deal with potential biases, boundaries of professional competence, and limitations of their expertise, so they may not be lead to or condone unjust practice. Vocational evaluators must consider their own potential biases and judgments by taking an honest self-assessment and personal reflection of their own feelings, thoughts and behaviors and to address their concerns with other competent professionals prior to engaging in the evaluation process. For example, if an evaluator has had a negative experience with an individual of a specific race or ethnicity, they will need to consider potential unresolved feelings that could impact their judgment or treatment of the individual from the same race or ethnicity. In matters of expertise, if an individual presents with a disability that the evaluator is unfamiliar with, they can consult a colleague who has more expertise and experience. If an evaluator is uneducated in certain cultural norms, they need to seek out information to ensure they are competently and appropriately approaching and treating their clients.

Vocational Evaluators strive to be honest, loyal and honor promises or commitments made that were legitimately engendered. For example, if an evaluator has informed a client and their stakeholder that they will be given the opportunity to utilize assistive technology during the evaluation process to ensure appropriate access, the evaluator needs to provide this opportunity. If the client has a transportation barrier, and the evaluator promises to secure transportation to the assessment site, they must follow up and provide transportation. If the referral agency has asked for specific questions to be answered, the evaluator must answer these questions. They must uphold professional standards of conduct, clarify their professional roles and obligations, accept appropriate responsibility for their behavior and seek to manage conflicts of interest that lead to exploitation or harm (Kitchener, 1984). For example, if the client discloses that their current employer, is verbally abusing them, this must be reported, regardless of the fact that the employer may be promising the client a promotion. These ethics shape, direct, and influence the tone of reports.

Referral Questions

Competent evaluators must take note of the questions asked from their referral source, ensure that the evaluation process addresses these questions, and that the report provides a detailed response. If the referral questions are not thoroughly described, the responsibility is on the evaluator to clarify and confirm. Knowing the questions ahead of time and confirming these with the referral source will provide the initial direction for the entire vocational evaluation process, and will eventually drive the information presented in the report. Pulling the referral questions out again to reference while writing the report will give the evaluator an idea of whether adequate and appropriate information has been gathered and documented. Thomas (2020) also recommends the use of an appropriate

referral form, where the referral form that is long enough to capture essential information but short enough to encourage efficiency. Furthermore, Thomas (2020) also recommends that new referral sources are provided at the orientation to the referral process to ensure appropriate referral questions are included. A strong report begins with appropriate referral questions.

Background Information

Intake Interview

The Vocational Assessment includes an interview with the client and the administration of multiple vocational assessment instruments. During the interview process with the client, the discussion may include addressing the clients' demographics; perception of their diagnoses; functional limitations and overall needs; impacts of disability to perform activities of daily living, participate in educational endeavors, and/or perform essential job tasks; legal history; military service; educational endeavors; basic competencies and skills; certifications gained from past employment or educational endeavors; vocational goals and actions made towards achieving their goals; and perceived obstacles or barriers that prevent goal achievement. Asking the client for detailed information through the interview process can help the evaluator comprehend the client's specific situation in order to shape the appropriate recommendations. Examples of necessary detailed information to obtain may include, but is not limited to dates of employment, pay rate and hours worked per week, reason for leaving the position, detailed job duties including which were enjoyed or not, how the job was obtained, if job coaching used (and if so, whether it was helpful), and what level of accommodations were recommended. In addition, throughout the intake interview process, the evaluator must be in constant observance of the client's behaviors, especially any behaviors that may be of significance while performing job tasks.

Information to Request and Review

In almost all cases, it is impossible for one to write an acceptable report without reviewing documentation. The important documentation from outside sources to be reviewed includes records pertaining to medical care, psychological care and evaluation, employment, and education. During this review, it is within the role of the evaluator to determine which pieces of information are relevant to the vocational evaluation and subsequent final report (Thomas, 2020).

Medical Records

Medical records provide insight to the client's diagnosis, treatment, functional abilities, functional limitations, prognosis, and potential future needs in regards to medical treatment. Connecting the information collected to the client's medical and/or psychological condition, including their diagnosis and functional capabilities, is essential. Some considerations for the evaluator must include understanding the date of the record reviewed as well as the objectivity of the record. Evaluators must be aware of the dates recorded, as older documentation may no longer be directly relevant. Regarding the

objectivity of the record, the evaluator will take note of who the responsible entity was for obtaining the medical report and, determine whether the specific report can be considered valid or if it is biased in any way. The best practice is to use the most objective medical information available.

Employment Records

For clients who have previous work experience, gathering thorough, available information about the client's past work history is vital. Employment records can provide insight as to the client's previous job duties and physical requirements of positions via job descriptions, pay rates via payroll records, ability to maintain employment, needed accommodations, and performance via performance reviews. An evaluator will keep in mind that research shows one of the best indicators of future work participation is demonstrated in the worker's past work participation (McDonnal and O'Mally, 2012). Breugh (1981) also found that prolonged or excessive periods of work absence tend to increase the probability of increased absence or nonwork participation in the future. The ability to outline objective and in-depth historical employment information can help establish realistic expectations and recommendations for the client's future employment probabilities.

Educational Records

Educational records can provide insight as to academic achievements, academic functioning, accommodations received, tracking progress towards reaching goals, and educational plans. Important educational records to consider include student portfolios, high school or college transcripts, IEP or 504 plans, degree plans, ACT or SAT results, or the results of previous academic testing. Evaluators must consider the age of the records as older educational records may not be reflective of a client's current ability (Thomas, 2020).

Writing the Report

Our goal as evaluators is to prepare and present a comprehensive Vocational Evaluation Report that synthesizes all of the information obtained from the objective review of records, from the vocational evaluation interview, and from the vocational assessment. The written report provides evidence of what the client did during the evaluation and serves as a product of the process. The skills required for report writing are complex (Thomas, 2020). The evaluator must have strong foundational skills and fluency in the technical aspects of vocational evaluation such as reliability, validity, interpretation, and scoring. However, the evaluator must also have social and relational skills such as building trust with the client. Therefore, the skills required to complete an appropriate evaluation include both the science and art of report writing.

The Science of Report Writing

Vocational evaluators are tasked with bringing together all of the data available about a particular client with the goal of presenting safe, reliable, and viable employment

opportunities including detailed recommendations to help the client reach their goals. This requires organization of the data collected via the interview process and from the review of records. Evaluators need to present this information in a logical and sequential manner that builds up to the recommendations. To do this, it is important to first understand the widely accepted sections of a Vocational Evaluation report. Per the State of Vocational Evaluators: A National Study by Sligar and Betters (2012) the following areas were determined to be consistent amongst evaluators in their reports: behavioral observation, summary of the evaluation process, client demographics, psychometric tests, work samples, situational assessment, and community-based assessment, findings, and vocational recommendations. (Sligar & Betters, 2012). Additional sections, which may or may not be included based on the client's specific situation, are career guidance, answers to referral questions, assistive technology recommendations, labor market analysis, medical information, job modifications, transferable skills, functional capacity evaluation results, learning styles information, and job recommendations. (Sligar & Betters, 2012). The rubric for the International Certified Vocational Evaluator credential (citation needed) requires that their certification holders be proficient in including within their reports: referral questions, work history including duration, duties, and reason for leaving the position, educational background, medical/disability restrictions and implications, personal and social background, previous assessments utilized including their description, work samples or other work techniques used and their description, as well as other assessment and work samples results with analysis. Another area to be addressed, and these authors would suggest adding to the rubric, include a summary of the goals of the client with evidence that can be in support or lack thereof their goals.

Documenting Observations

Behavioral observation is an essential component of a vocational evaluation and can assist with accurate interpretation of data on the vocational evaluation report (Thomas, 2020). Observations of the client are made throughout the evaluation process which include not only their behavior, but also any responses to accommodations or assistive technology that will be utilized. This includes during the referral and scheduling process, during the intake interview, assessment, and any real or simulated work activities, and from the post-evaluation process. Inclusion of observational data from these activities is essential to any thorough report. Proper and thorough documentation of observations helps with the synthesis, triangulation, and the recommendation process to address client's behaviors, help to confirm information provided by the client, determine accommodations, and provide an overview of what may be expected from the client in an employment context.

A cornerstone in vocational evaluation is the inclusion of work activities, both those that are based on past performance or simulated through the assessment process. Attention should be given to the environment where the work activities are performed. Observations can be informal or formal, occur in a variety of environments, made by a variety of people and ought to be well documented in an objective, non-biased manner (Smith et al., 1995). In the 30th IRI, it is indicated that observations are not meant to detail every action of the client but chosen for inclusion in the report based on the usefulness to recommendations and occupational options (2003).

Just as we need to ensure our observations are relevant, we must also be cognizant of how our observations are communicated. While an observation may be factual, is it tactful? Bornstein, cautions against language that may come across as too frank or direct to the client and to consider how observations can be conveyed with more sensitivity (Bornstein as cited in Huff, 2020). To add the voice of the client to observational data, Holman likes to incorporate quotes from clients or metaphors they have used to describe themselves, as a way to bring the patients to life on paper (Holeman as cited in Huff, 2020).

Triangulation and Synthesis

In research, triangulation is the process by which information available is compared and how this can lead to increased credibility and validity (Cohen, et. al., 2000). By looking at how various pieces of information available for review are consistent, the evaluator can help to provide an overview of a variety of data points on a single topic. Comparison of information on each topic is essential for the preparation of a comprehensive report, as all the information necessary may not be able to be obtained from one source. Triangulation includes four key components: what is expressed by the client, what is available to review in records, what is demonstrated by the client, and what objective test results reveal.

Triangulation begins with information that is expressed to you by the client in the interview process, which is then compared with what the client demonstrates during the assessment process, and also compared to the results of the vocational tests. What can be ascertained or built upon from available documentation subject to review is also an important consideration when triangulating data. For example, vocational assessment scores can be compared to the scores which may have been able to be obtained through the review of educational records. The consistency, or sometimes inconsistency, needs to be discussed within the report as well as the implications that it has on the recommendations that will be presented.

Synthesis is the process of bringing together data with the purpose of drawing conclusions about how the client can achieve their goals. If the client does not specify their goals, synthesis can help them to identify and establish their goals. When the client has already established a goal, synthesis can help to confirm the appropriateness and/or determine the best way to successfully implement the plan. Thomas (1986) outlined that this process, and its subsequent interpretation, can be the most difficult part of the evaluation process.

This continues to be true as every client with whom an evaluator works with will not have the exact same scenario, as such, no two reports are the same. Information used within the report ought to be verified, demonstrated, expressed, measured, and specific to the individual you are preparing the report for. The Vocational Evaluator is advised to not take all information at face value and, if you cannot explain it to someone else or articulate it in your report, further research needs to be conducted.

If there are inconsistencies that are worth noting in the report, evaluators will include this information with a person-centered focus. The goal is not to try and call out this client but to explain inconsistencies that might impact future vocational rehabilitation service provision.

The skills of synthesis and triangulation are essential in vocational evaluation report writing, as writers must take the utmost care not to make recommendations that are contradicted by the data they report. For example, recommending a job in a retail store after reporting a history of repeated shoplifting, suggesting an educational program for someone who does not meet the academic entrance requirements, or offering ideas for employment that ignore a client's physical conditions are all situations in which the information available was not appropriately triangulated and synthesized. A credible report will take a holistic approach to gathering data, considering the entire scope of a person's physical, psychosocial, emotional, behavioral, and vocational strengths and needs. It will also take an honest look at the limitations of the evaluation, alerting the reader to areas where more information may need to be gathered.

Interpretation

Interpretation can be summarized as explanation of the meaning of something. For the purposes of writing a Vocational Evaluation report, this would include the translation of raw data into information that can be utilized to improve vocational attainment (30th IRI, 2003). Interpretation requires explanation and ties together the triangulation and synthesis of data.

Interpretation and explanation of data will be required in order to present occupations and recommendations which are suitable for the client and consistent with their goals. In data interpretation, it is important to include the client's transferable skills, the reasoning behind educational and employment recommendations, and identify what supports, accommodations, modifications, or assistive technology may be needed during those endeavors.

Descriptive and detailed recommendations written in a way that prescribes the processes and possibilities will facilitate success, as outlined in the 30th IRI (2003). When writing recommendations, it is important to make them sequential for easier implementation. All recommendations should demonstrate how a client is being propelled towards success. By having gone through the data interpretation process, the evaluator can outline a step-by-step process addressing how the client can be successful in each of the suggested processes. Within each step, it can be important for the evaluator to identify environmental issues, supervision needs, instruction and recall requirements, accommodations, techniques that were beneficial during the evaluation or past work to be able to empower the client to successfully complete each step (30th IRI, 2003). Reports written by evaluators need to be individualized and specific to the unique client evaluated. While the format between reports may be consistent, no two reports will ever be the same.

The Art of Report Writing

While writing a vocational evaluation requires technical skill that can take years to hone, there is an art to writing that is just as necessary to ensure readability of the document and respect for the reader.

Person-Centered Approach

Vocational evaluation is a highly interpersonal process and experience, both for the evaluator and the client. In the end, a report is written to capture this unique process of self-discovery. Assess means to sit besides, and this is what Vocational Evaluators do. Clients are participating in an evaluation because they need answers to questions, and they need assistance. The evaluator's role is not only to guide and facilitate, but most importantly, it is meant to function as a supportive role. An evaluation is not something "done to" the client, it is a process to go through "with" the client. In the simplest sense, an evaluator must be prepared to hold space for a client to learn, discover, consider, and eventually make critical and informed choices for their vocational planning. There are many things to consider prior to writing a report. First and foremost, it is crucial that an evaluation begin with the client in mind. Thomas (2020) reminds evaluators to design vocational evaluation from a person-centered perspective.

Ensuring that the report will be helpful for the client, should be the motivating and driving force to enhance the evaluator's focus. Evaluators spend a significant amount of time building rapport with clients. Building on this momentum can steer the focus of the evaluation report writing process. Wanting to ensure that the report is positive, understandable, and helpful for the client will be an impelling place to begin. Remembering to keep the report person-centered is vital.

Empathy for the client can also promote positive report writing practices. Picturing oneself in the shoes of one's client, can help mentally prepare the evaluator for writing with the client in mind. Thinking about the client's socio-political world and how their environment(s) impact their thoughts and behaviors will be helpful (Huff, 2020). Knowing the client's background information, understanding their family situation, socio-economic needs, cultural factors and other relevant contextual factors will allow the evaluator to create a report that truly is tailored to fit the client.

Using Language with Readability and Respect

Understanding the correct way to document observations, using appropriate language, and keeping the readers and stakeholders in mind are key to creating a work product that is meaningful, tactful, and useful. A well-crafted vocational evaluation report is written with careful consideration to the client, as well as the audience. It offers recommendations rather than dictates.

The language with which a report is written can be nearly as important as the content itself. Using the appropriate language to refer to a person's disability is not always as simple as using widely accepted person-first language. The American Psychological Association (2020) references the best practice of deferring to the disability language choices of the individual client when choosing how to refer to them in the report. The

responsibility is on the evaluator to understand person-first *and* identity-first language. Person-first language emphasizes the person and not the client's disability or chronic condition (e.g., "a person with paraplegia" vs. calling the person, "a paraplegic"). However, some clients prefer identity-first language. This refers to situations where an individual claims their disability and chooses to acknowledge it as part of their identity rather than permitting others to name it. Often, it is used as an expression of cultural pride and a reclamation of a disability that once conferred a negative identity. This is the choice of the client, and such situations should be identified by evaluators on a case-by-case basis. In the report, the preference of the client as to how they choose to self-identify should be noted and utilized. Identity-first language is more often favored by clients who are more comfortable with their disability as a cultural factor or identifying trait (Dunn & Andrews, 2015).

In general, it is recommended that evaluators avoid language that uses pictorial metaphors or negative terms that imply restriction unless preferred by the client. For example, instead of using "wheelchair bound" or "confined to a wheelchair," use "wheelchair user" (Dunn & Andrews, 2015). Language such as "high functioning" or "low functioning" are problematic and ineffective in describing the nuances of a client's experience with a developmental and/or intellectual disability. Instead, specify the person's strengths and needs (Dunn & Andrews, 2015).

Readability of the report is important. As a report preparer, one can do an extensive amount of research and data collection, but if it cannot be written in a manner that is both understandable and implementable it will not be of benefit to either the placement team or the client for whom the recommendations were prepared. Write in past tense when discussing data and conversations, as these refer to activities that occurred prior to the writing of the report. It is recommended that the evaluator avoid the use of absolutes and stay within their area of expertise (Thomas, 1986). For example, an evaluator would not make determinations related to a person's mental health diagnosis, needed treatment, or medication recommendations as this is not their area of expertise. Additionally, an evaluator would not make a recommendation based on functional skills and limitations that require a formal analysis by a physical or occupational therapist. Evaluators would also not make statements about labor market specifics in which a workforce development professional should be consulted for. Pades (as cited in Huff, 2020) encourages writers to ask themselves whether each paragraph in their report is understandable and whether the information holds meaning to untrained readers (Huff, 2020).

Ensuring readability allows the findings to be relayed to the client in a way that can be personally comprehended. The Commission on Accrediting Rehabilitation Facilities' (CARF) criteria for exemplary Comprehensive Vocational Evaluation Services encourages making sure that "the person served understands the results "as a hallmark of quality results" (CARF, 2020). By the time the evaluator writes the report, they will want to have a strong understanding of how the client will process the information presented and will need to use a personalized format to share the results. A thorough wrap-up meeting to collaborate and share findings will allow for time to check-in with the client to ensure understanding and to allow all stakeholders to ask questions. To simplify the information

in a complex report, evaluators may consider pulling out the most important points, breaking information down in graphic organizers, or rewording recommendations for the client in a separate document.

Sensitivity when Making Recommendations

In order to be complete, a report must include interpretation of data from the evaluation that aligns with the comprehensive recommendations (Thomas, 2020). To further respect the voice of the client in the vocational evaluation report, remember that recommendations must always include the client's feedback and voice, and must go beyond the simple examination of skills and potential (Dillahunt-Aspillaga, et. al., 2015). The 30th Institute on Rehabilitation Issues (2003) noted that by adding the wishes of the client, the chance increases that recommendations will actually be used as the client feels that the report is applicable. Dillahunt-Aspillaga, et. al. (2015) found that respondents in their study on vocational evaluation following traumatic brain injury were easily able to read the reports with recommendations that appropriately reflected the collaboration and agreement between stakeholders. Along this vein, making time at the end of an evaluation to discuss possible recommendations and options with a client is a way to ensure buy-in and what next steps the client is willing to take based on the recommendation.

To put guidance into the correct context, make sure you frame it as suggestions and recommendations rather than commands, as Holman suggests (Huff, 2020) "Client may find ____ helpful" is more palatable than "The client should ____." If the client takes offense to the presentation of recommendations, they may disengage from following through with future service providers who will be implementing those recommendations.

Common Pitfalls and Mistakes

When writing reports, vocational evaluators can avoid common pitfalls, mistakes, and myths that result in wordy, incomplete, and inaccurate work products. Thomas (1986) warns evaluators not to write reports that are too long or opine on previously known information. Those reports that fail to address referral questions, give no alternative employment goals, or report data and scores without interpretation, lack usefulness and applicability. Reports riddled with contradictions, like discrepancies between work goal and demonstrated academic skills, are not helpful at best and can be damaging at worst.

Wordiness

Rather than lose readers in wordy rehashing of information, many writing mentors suggest the mantra of writing tight, or sharing ideas in as few words as it takes to get the point across accurately. The book *Write Tight* by Brohaugh (2007) cautions that wordiness can actually cause the reader to skim through writing as he or she searches for useful information. As Thomas (1986) notes, writers believe the myth that the addition of details means information is accurate, and long reports signify comprehensiveness. However, this may not necessarily be true. Instead, Schneider, (as cited in Huff, 2020) asserts that longer reports are often more so regurgitations of data than organized and

thoughtfully crafted work products. Thomas (1986) recommends keeping average sentences short, varying sentence length, sticking to simple over complex, avoiding unnecessary words, and using action verbs.

Assertions and Assumptions

A strong writer will not make assertions or draw conclusions that are not backed by evidence or are not accompanied by solutions. As Schneider says, readers are seeking answers to problems, not reiteration of evidence (Huff, 2020). For a well-balanced approach, it is important to avoid hiding behind the test results or data. Thomas notes that evaluators mistakenly assume that standardized data makes information more reliable, standardized scores and percentiles make information believable, and that repeating prior evaluations is helpful (1986). Instead, a strong report writer will carefully look for intersections and contradictions between measured, expressed, and observational data.

Focus on Limitations of the Client

A report that only highlights and addresses the client's limitations will not be comprehensive and will miss opportunities to utilize known strengths. Without addressing what a client is capable of, the report not only takes on a tone of negativity but lacks practical application.

Not Addressing Referral Questions

To ensure that the vocational evaluation report is appropriately assisting the client in achieving their goals, it is essential to thoroughly answer all referral questions. By not doing so, both the client and all involved members of their vocational team are left with unanswered questions.

Failure to Address Limitations of the Report or Vocational Evaluation Process

When it is found that more information is needed to make thorough recommendations, this will be noted, along with other specifics and relevant information, regarding what the evaluator would have done differently given additional time or resources. The writer will also include when referral to other service providers is appropriate to gather additional information.

Lack of proofreading

Additional considerations which can make a report difficult to read and/or can cause the substance of the report to be missed include sloppiness or improperly stating opinions as has been indicated by Graham Consulting, LLC (2011). To avoid this, proofreading and doing a final read-through of the full report is essential. Handing off reports for peer review within the same office is advised.

Special Considerations

Considerations for Discovery Profiles

At times, evaluators need to move beyond the scope of a traditional assessment to use another creative and collaborative process such as Discovery. This is an ideal, person-centered process to use when test performance and related measurements are not expected to yield favorable or useful results. Used with clients with complex conditions, Discovery is a qualitative approach and precursor to the customized employment process developed by Marc Gold and Associates (Callahan, 2018). Whereas a traditional vocational evaluation report details comparative data with predictive and prescriptive recommendations, a report for Discovery - called a Discovery Profile - is an observational snapshot of current functioning for the purpose of planning. Specific characteristics of a Profile are given below, as outlined by Callahan (2019).

- A Discovery Profile avoids the use of comparisons or scores while describing in detail the client, their life, and activities they can perform.
- The Profile is objective and free of opinion when detailing observations. The work and capability of the client speaks for itself through the documentation.
- A Discovery Profile expects employment and never deems a person who wants to work as unemployable.
- A Discovery Profile is considered the property of and a collaboration with the client, rather than a work product belonging to a business or agency.
- A Profile is comprehensive in finding examples of the client at their best at home, at work, at school, and in the community
- A Discovery Profile is robust and includes information about activities, considerations, people, and routines of importance to the individual.
- A Profile does not compare the client to others. Only where areas of excellence are identified does the evaluator note comparisons to others' performance.
- A Profile is meant to be a resource for planning and negotiating a customized employment situation.

Considerations for Forensic Evaluations

The emphasis of a vocational evaluation in a forensic, legal process varies from that of evaluations utilized in other settings. In a forensic evaluation, the primary focus of the evaluation is to determine what, if any, impact an acquired disability has on the client's ability to obtain and maintain future employment. A secondary factor to be addressed often includes the potential loss of earnings the client may have experienced due to the acquired injury and impairment. Therefore, some important considerations should be made by the Forensic Vocational Evaluator that may differ from information presented within this article. Specific considerations are listed below.

- The individual being evaluated is not considered to be the client but instead this shifts to be the referral source.

- Forensic evaluations often have an emphasis on the client's level of recovery, physical abilities, resultant limitations, and have a focus on the financial impact of the injury.
- A personal interview of the client does not always occur and often, when retained by the defense counsel, the vocational evaluation focuses on the review of the plaintiff's expert report, medical records, testimony or interrogatories, as well as other relevant case documents. In this instance, it is important that the evaluator gather as much information as possible for the purposes of synthesis, triangulation, and interpretation.
- Within a forensic evaluator's practice, utilizing a consistent methodology amongst all evaluations performed helps to build credibility and objectivity.
- Observations often require triangulation between what physicians have indicated in narratives, abilities indicated in various therapies, what the client demonstrates in the evaluation, and how the client self-reports their abilities. This should be documented in the report regarding both consistencies and inconsistencies.
- There is often a heightened importance of past employment and a reduced emphasis on future educational opportunities.
- Economic impacts of the injury, including the potential loss for earning capacity, is important. Additional documentation/tools which may be utilized and outlined for determining a loss of earning capacity and to justify recommendations may include but are not limited to those from the United States Department of Labor, United States Bureau of Labor Statistics, state specific employment projections, the Social Security Administration, or National Occupational Classification for Canada.
- Informed consent is often not required to be obtained. While it should always be explained to the client the purpose of the evaluation, consent is often considered implied as the evaluation occurs or is considered a requirement of their legal case.
- Vocational evaluations are rarely reviewed with the client.

Checklist Tool for Vocational Evaluators

The writing of the vocational evaluation report is a useful tool that portrays the client's strengths, obstacles to overcome and how to overcome them, and outlines the plan to assist the client in being able to successfully reach their career goals. The report can be viewed as a compassionate picture of the client which can best be developed by getting the opportunity to know the client through the interview process, by gaining a greater understanding of the client through the review of records, and by administering and analyzing the results of the vocational assessment. The triangulation, synthesis, and interpretation of the data provides a comprehensive and supportive report.

It is important to note that the skill of vocational evaluation report writing takes time and practice to develop. Peer-review is recommended as new evaluators to assist with development this skill. In addition, the following checklist is provided to assist evaluators in the report writing process:

- Have I included within my report the sections and information required by my agency, employer, accrediting body, etc.?
- Did I receive, review, and outline necessary documentation including, but not limited to medical, psychological, educational, employment, and/or financial records?
- Does my writing reflect person-first language and is it presented in an honest manner?
- Did I include behavioral observations, including client quotes, in an objective manner?
- Did I balance the client's functional limitations with their strengths and potential?
- Did I appropriately interpret the data available?
- Did I triangulate the data available from records, interviews, behavioral observations, and the results of assessment?
- Did I acknowledge and address any discrepancies or consistencies determined through the synthesis of the triangulated data?
- Did I develop recommendations taking into account the interpretation of data?
- Did I fully outline recommendations, in a sequential manner, which will assist the client in reaching their employment goals?
- Do my recommendations include alternate employment goals?
- Did I write the report so it is understandable and in a manner the client will understand?
- Did I include and thoroughly answer referral questions?
- Did I seek out the professional input of others where my expertise is limited?
- Did I review the surrounding area to ensure my recommendations match up with labor market demands?
- When applicable, did I review all of my recommendations with the client before writing the report?
- When applicable, did I seek feedback from the client to ensure they are in agreement with the recommendations?
- Did I proofread my report, or hand it off to a peer, for proofreading?

To further assist evaluators, the above indicated Checklist Tool for Vocational Evaluators with an option for adding notes is available as a single-page addendum to this article which can be printed and utilized by the evaluator.

Summary

The vocational evaluation process and report serves as one of the single most impactful processes to help an individual with development of career goals as well as pave the pathway to success. The level of impact is directly related to how well the report is written, clarity, and practical use by both placement teams and the client. Evaluators can guarantee that the reports they prepare directly contribute to the client's success by abiding by guiding vocational evaluation principles, triangulation and synthesis, person-centered writing skills, avoiding common myths and pitfalls, addressing referral questions and recommendations, making proper recommendations, and forming a habit of checking for these components using the Checklist Tool for Vocational Evaluators.

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